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The new metric that matters

September 6, 2018

Session roadmap

1. Current environment of consumerism in healthcare
2. The +/- impacts of loyalty on your organization
3. Industry tools and metrics that assess loyalty
4. 7 aspects that impact loyalty and how to quantify each

A bit about me

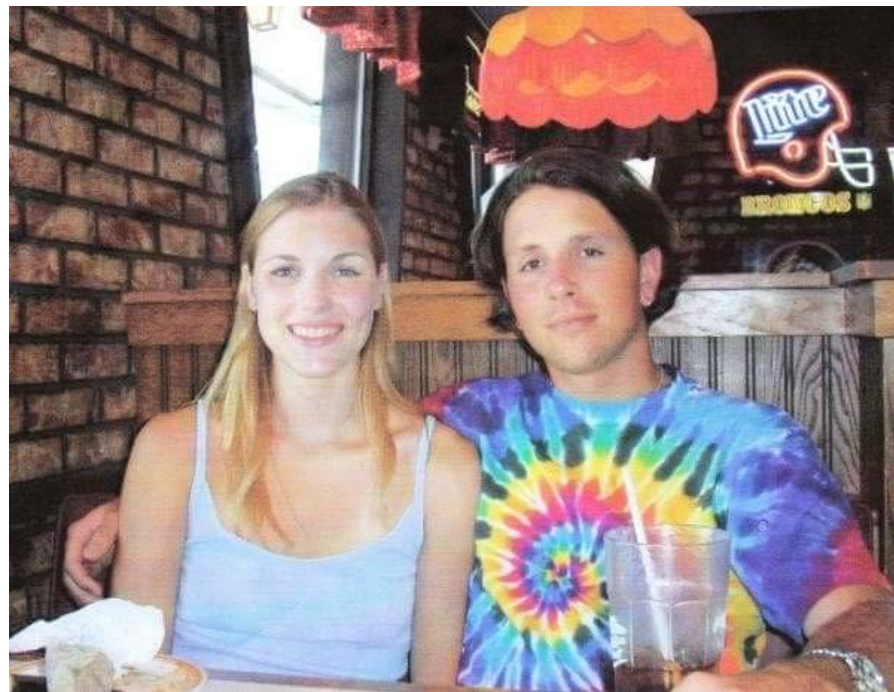


Brian Wynne

VP & GM, NRC Health



A bit about me



A bit about me



A bit about me













World Class Care.

Quality + Quality.

The Bestest Ever.



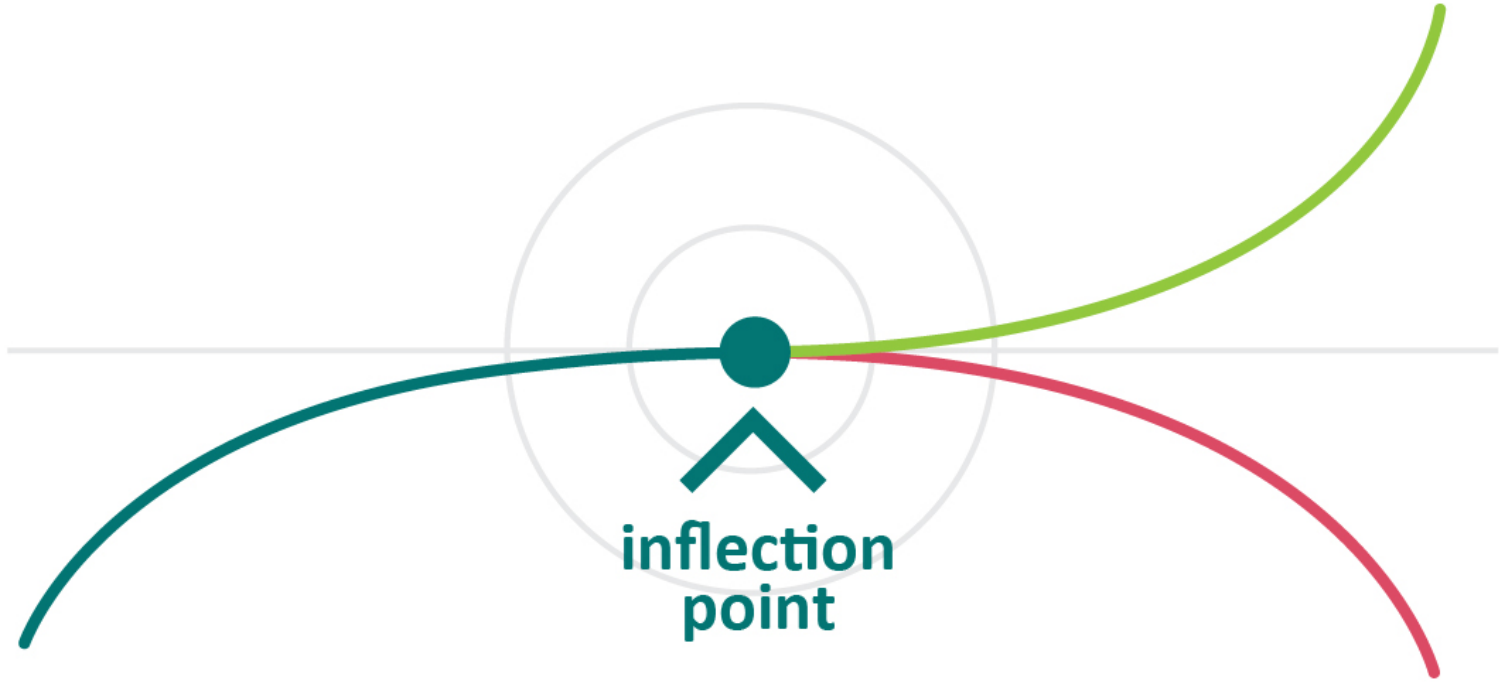
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1. The current environment of consumerism in healthcare





We now live in a
consumer driven healthcare economy

Consumer expectations of healthcare have changed for good



OUTCOMES

Not diagnoses

PERSONALIZATION

Not generalization

CONSTANT IMPROVEMENT

Not status quo

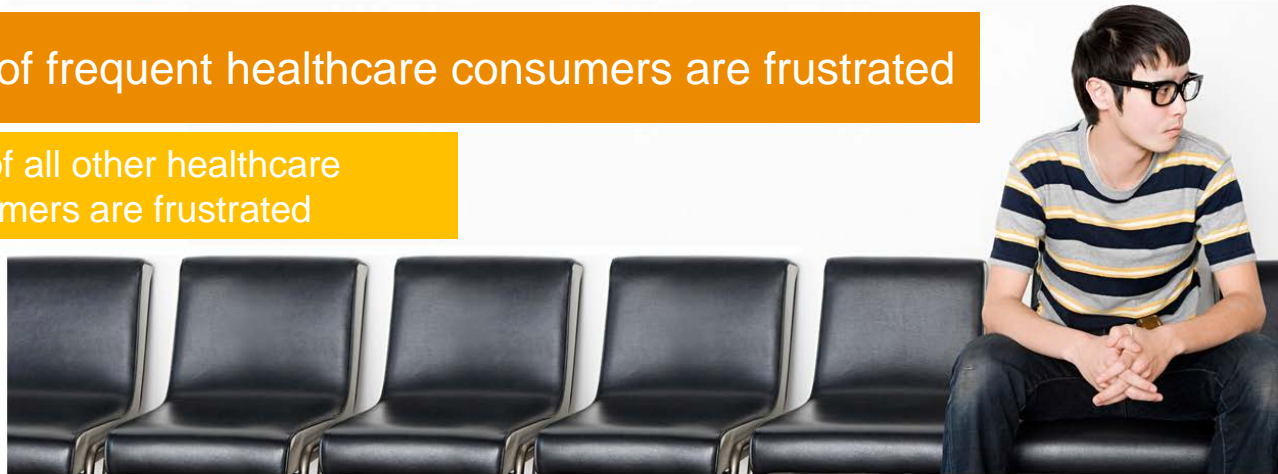
CONVENIENCE

Not complexity

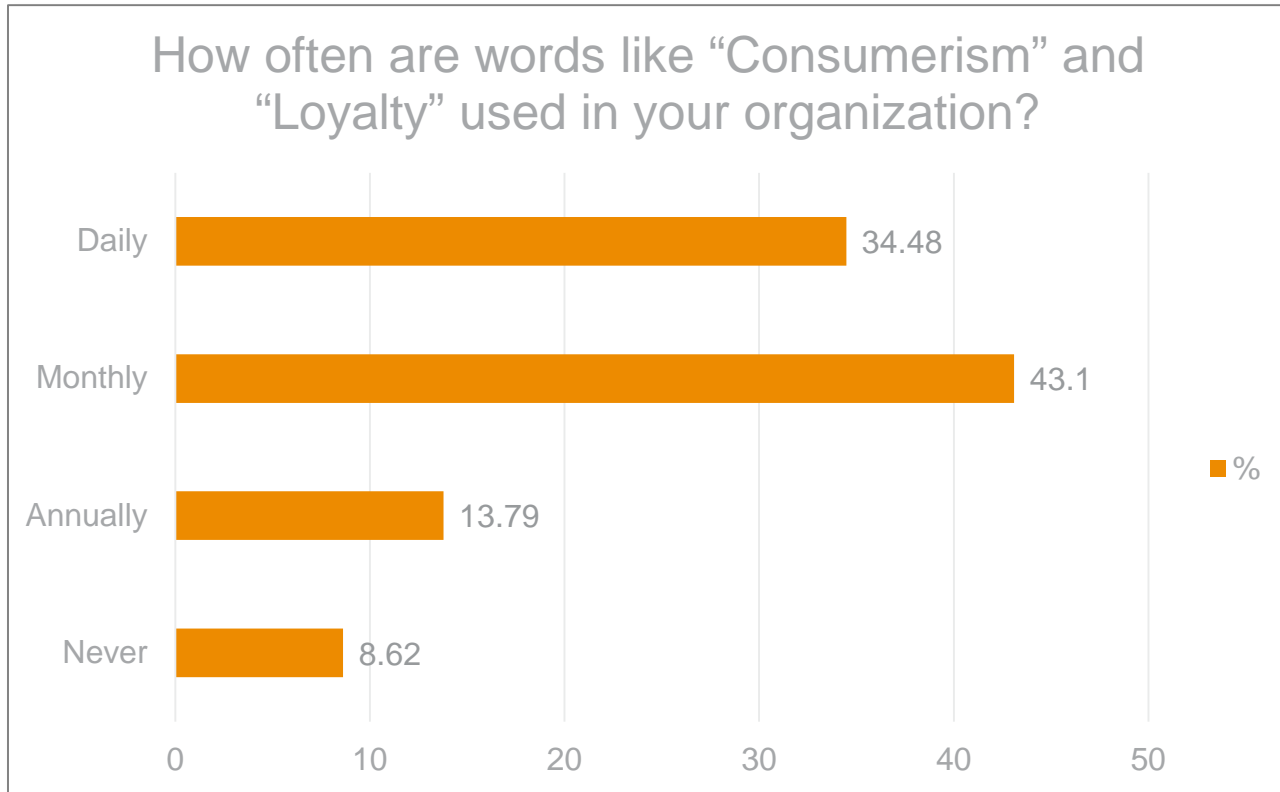
An alarming **81%** of consumers are unsatisfied with their healthcare experience – and the happiest consumers are those who interact with the system the least

75% of frequent healthcare consumers are frustrated

48% of all other healthcare consumers are frustrated



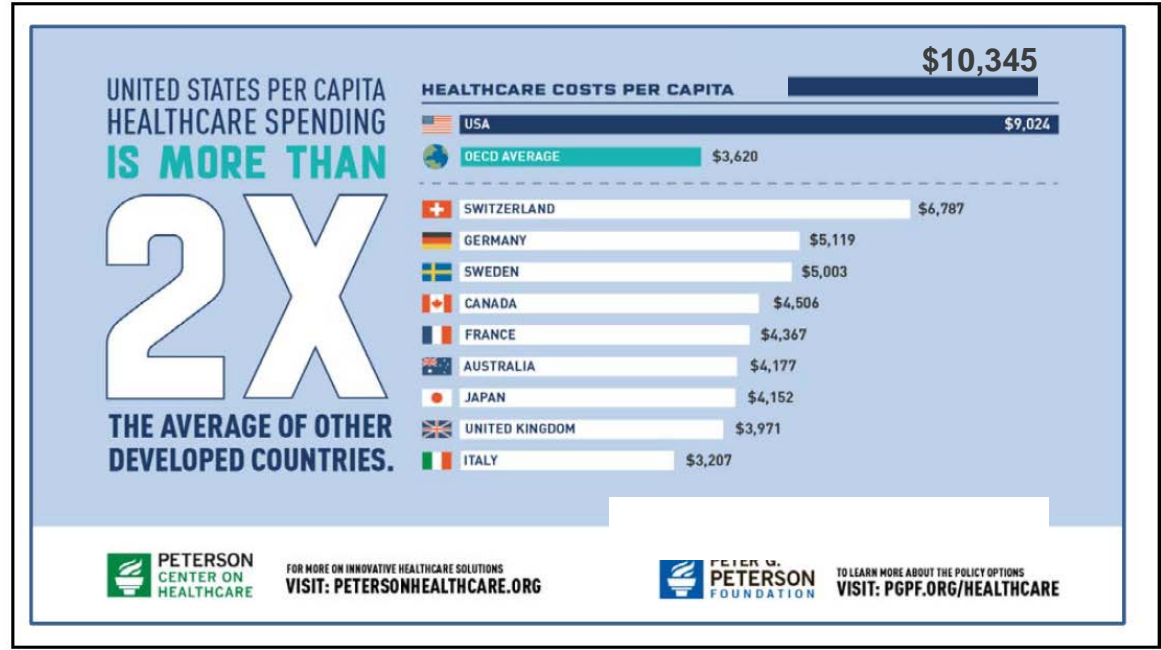
Poll Participation



1/5

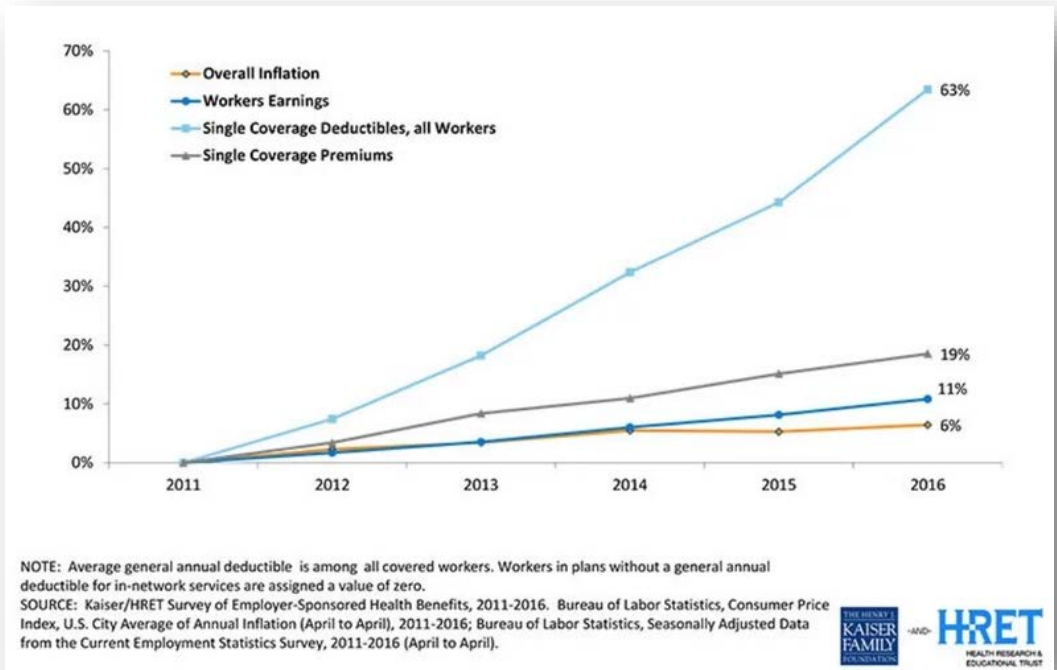
In 2025, 19.9%
is the projected
percent of GDP
that will be
spent on
healthcare
(\$5.5 Trillion)

Source: CMS



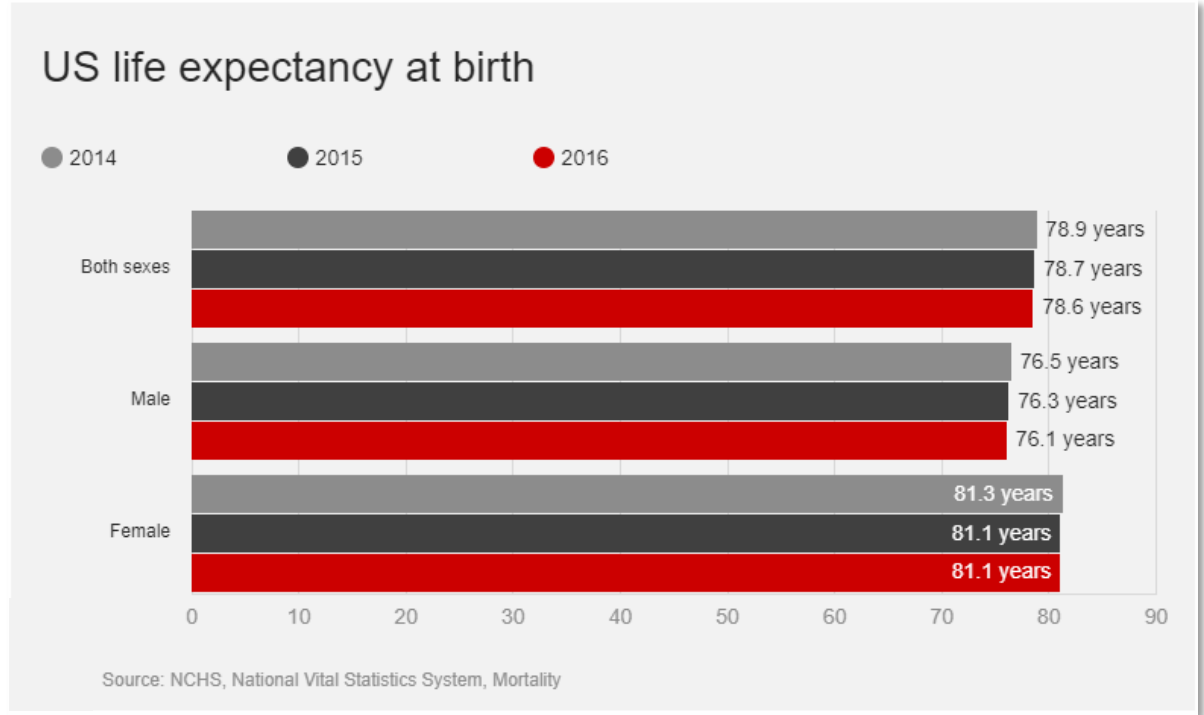
Deductibles

Insurance deductibles and premiums continue outpacing earnings and inflation.



53 Years

First time in 53
(1962-1963)
years that US life
expectancy has
decreased two
consecutive
years



Millennials

May live shorter lives than their grandparents today.

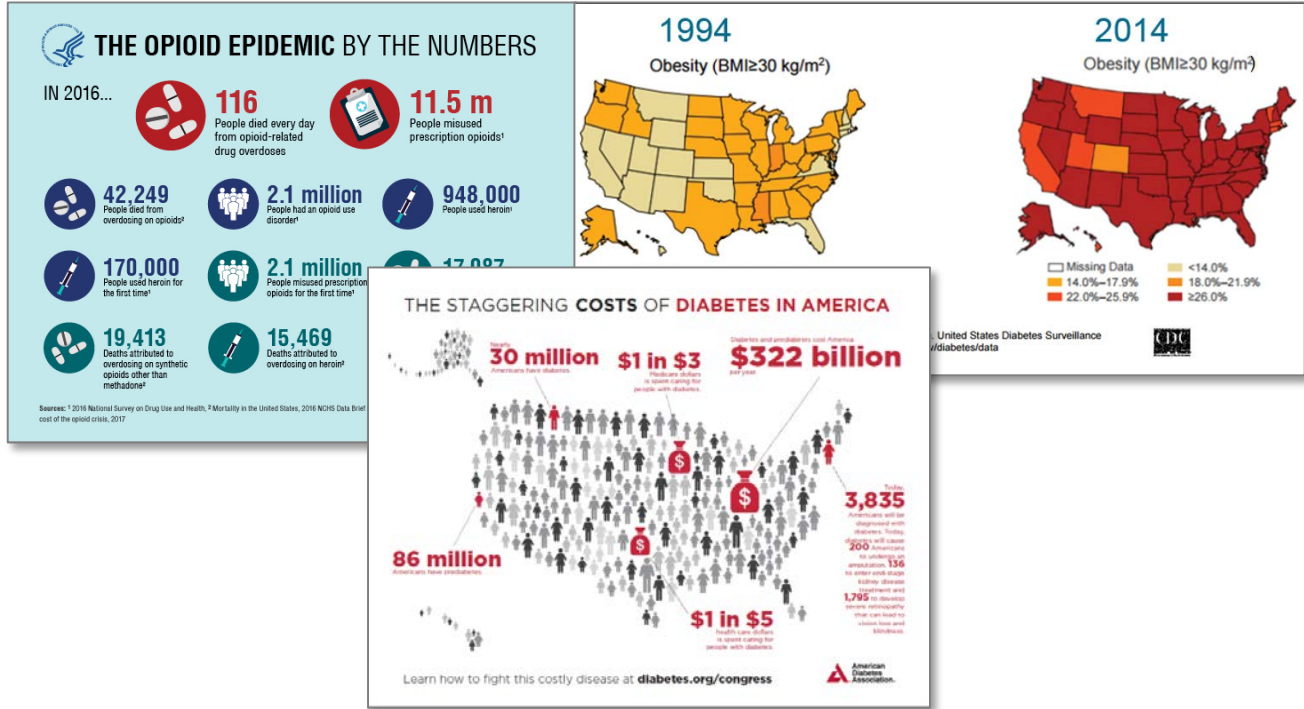
American Life Expectancy Gets Shorter

Age	Female life expectancy	2016 Change	Male life expectancy	2016 Change
25	89.5	-0.6 ▼	86.9	-0.7 ▼
35	88.8	-0.6 ▼	86.2	-0.7 ▼
45	88.1	-0.6 ▼	85.6	-0.6 ▼
55	87.6	-0.6 ▼	85.2	-0.6 ▼
65	87.8	-0.5 ▼	85.8	-0.5 ▼
75	89.4	-0.4 ▼	87.9	-0.3 ▼
85	92.8	-0.3 ▼	91.8	-0.2 ▼

Society of Actuaries 2016 Bloomberg

Epidemics

Diabetes, Opioids, Obesity



Entering the Era of Disruption

Trending News Today: CVS, Aetna Merger Moving Forward in 2018
Laurie Toich, Associate Editor
Publish Date: Friday, February 09, 2018

Like 16 Tweet Save G+ Favorite Email Print Comments Share

Merger Could Create Nation's Largest Health System


By Mitch Ryals

Marketing

BI

Business
BUFFETT
going for

Could Apple's move into EHR allow pharma to connect directly to patients?



Buffett expects health care effort with Amazon, JPMorgan to open up to other companies

by Chris Isidore @CI

Apple, Amazon, Google, Facebook, Microsoft : All 5 Tech Firms have secretive Healthcare Skunk works, are hiring Medical talent and are buying or backing Healthcare Startups

February 20, 2018

Apple will open medical clinics for its employees this spring

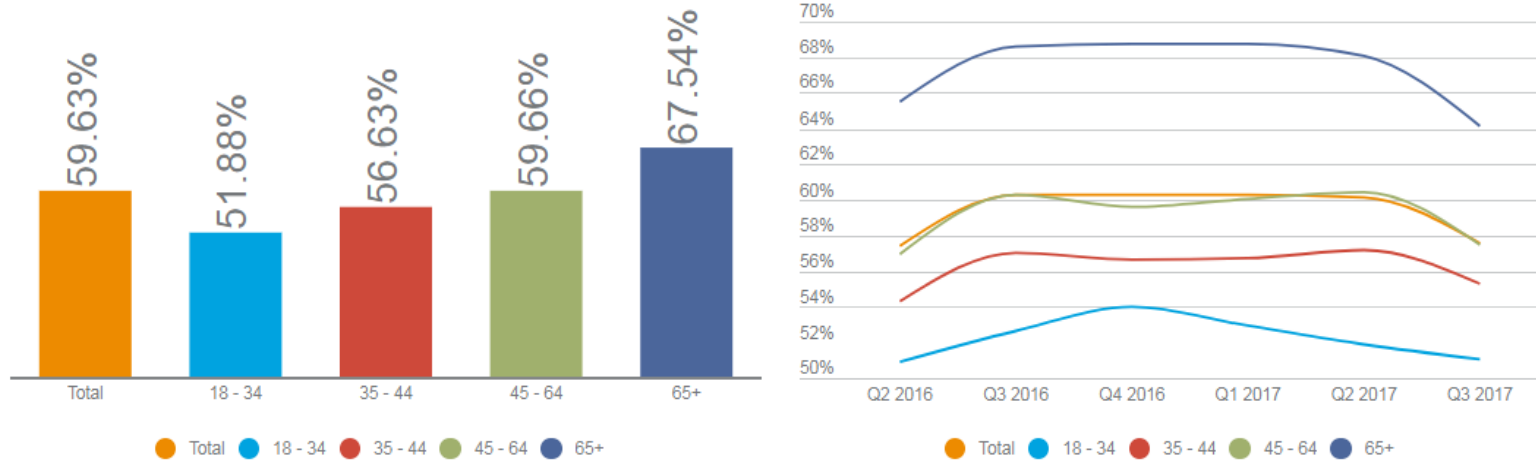
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2. The +/- impacts of loyalty in your organization

40.37%

of Consumers are **NOT** Loyal to a Hospital or Health System

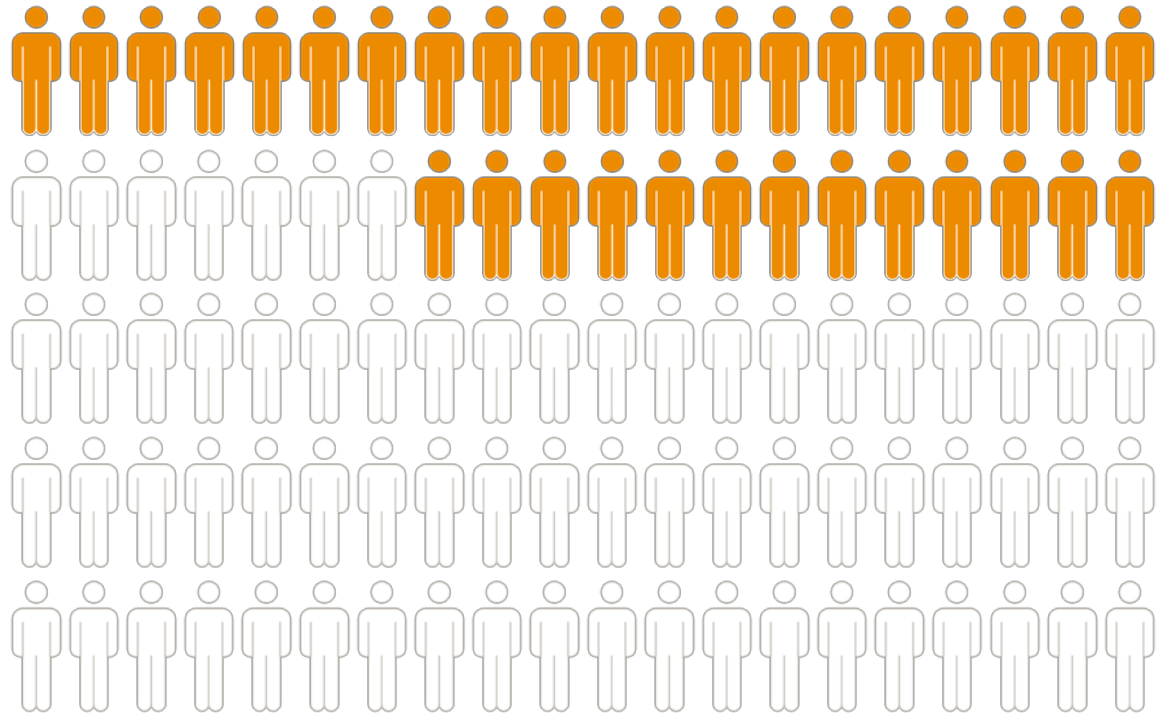


Q: *Would you consider yourself a loyal customer of a local hospital or health system?*

PATIENTS “NOT WILLING
TO RECOMMEND”

33%

2008

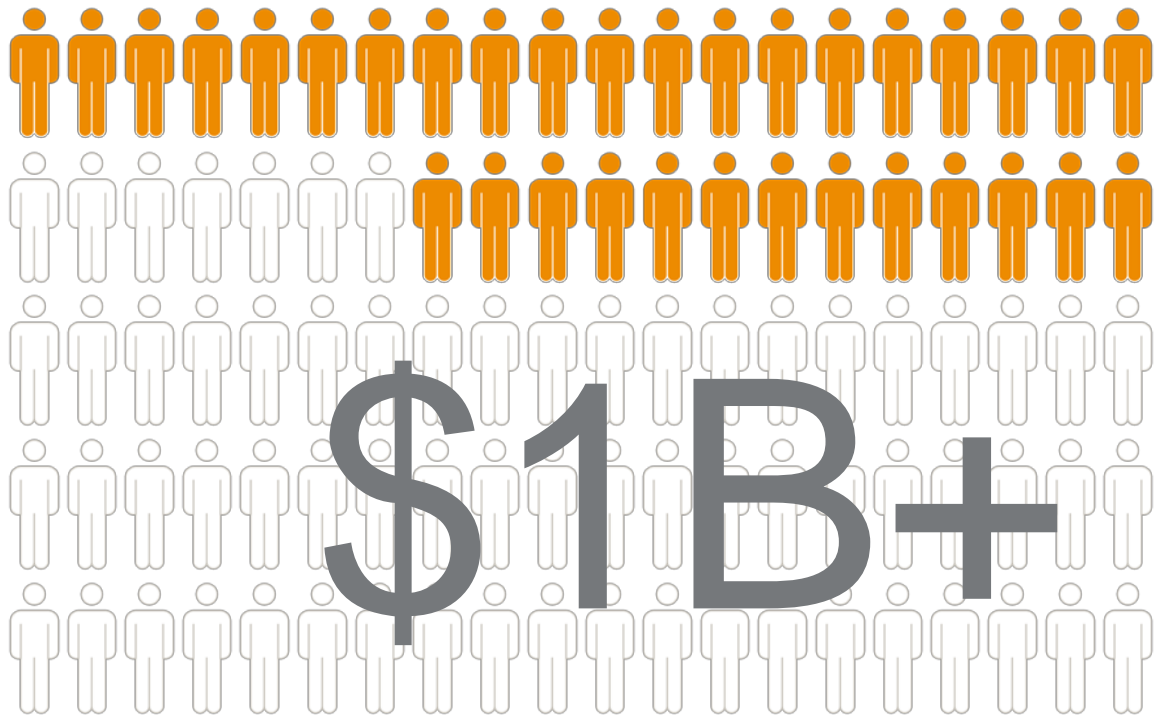


PATIENTS “NOT WILLING
TO RECOMMEND”

33% 28%

2008

2016



Why should we care?

The average lifetime value of a healthcare consumer is enormous and continues growing. Lack of loyalty represents an opportunity for millions in additional revenue gain...or loss.



Average lifetime value
of an individual

\$1.4 Million




Consumers with a PCP cost
the system

1/3 Less



Increasing retention just 5%
increases profits by

25-95%



Organizations must provide value
across the continuum or face acquisition or failure

No margin, no mission.

#3 Don't know

#2 Everyone

#1 MARKETING

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3. Industry tools to assess loyalty

“We’re the only game in town.”

“No one here understands consumerism.”

“Lack of data.” (25x’s)

1. Perform a feedback audit

Visible, accessible, and financially viable option for those seeking information and/or care.

Voice of customer is captured at every encounter to inform experiential design.

All customer care transitions are ensured to be safe, consistent, and efficient.

Your organization – 100% of the time

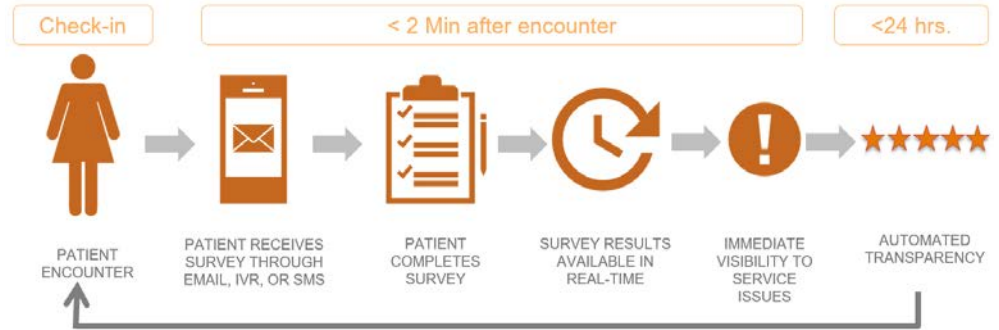
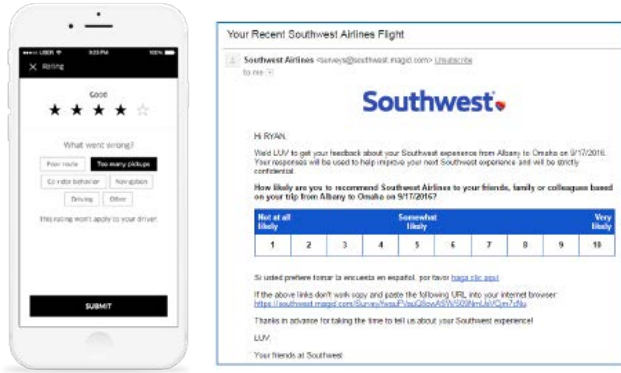
Customer experience & cost data is publicly transparent to promote physicians & build trust

Care teams are empowered with visibility to real time service recovery opportunities

Loyalty is measured to quantify quality, financial, and cultural impact.



2. Implement Intelligent Feedback Systems



73% of patients want to be asked for feedback a few minutes to a few days after the care event.

84% of patients expect you to follow up with them if they have a bad care experience.

3. Measure loyalty with NPS

Net promoter score is used in and out of industry as a way of measuring loyalty with 1 simple question:

“How likely are you to recommend <<brand/product>> to a friend, family member, or colleague?”



Costco
Type: B2C
Size: Large



Walmart
Type: B2C
Size: Large



Starbucks
Type: B2C
Size: L



Macy's, Inc.
Type: B2C
Size: Large



Microsoft Office
Type: B2C/B2B
Size: Large



Tesla Motors
Type: B2C
Size: Large (>100M \$)





• EFFICIENT

• TIMELY

• VERIFIED

• ENGAGED

4. Tap into your “free” consultants

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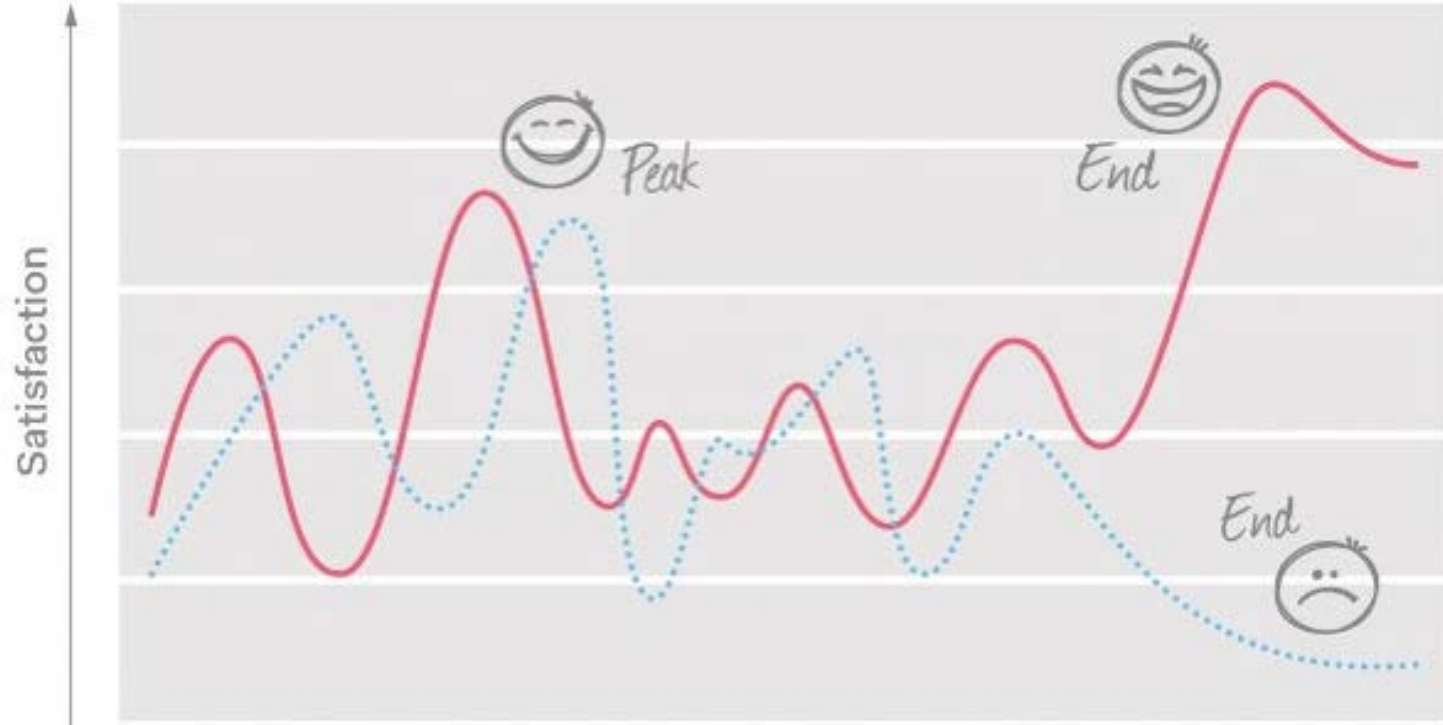
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4. 7 aspects that impact loyalty and how to quantify each

The “Peak End” Theory: A Moment Can Define an Experience



How do we know what to measure?

Brand

- **87%** of consumers say reputation is very important or important when selecting a facility

Engagement

- **61%** of consumers say online ratings and reviews are very important or important in selecting a facility

Need

- **88%** of consumers say a facility covered by their insurance is very important or important in selecting a facility

Access

- **77%** of consumers say convenient location is very important or important in selecting a facility

Motivation

- **72%** of consumers say cost of service is very important or important in selecting a facility

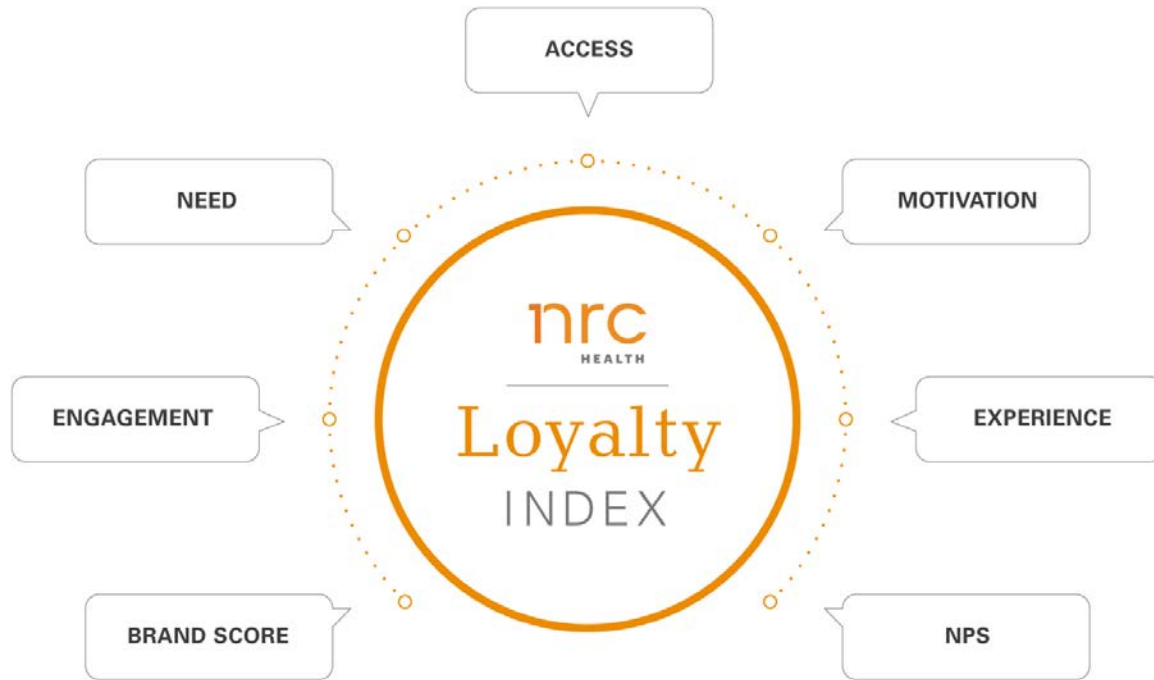
Experience

- **80%** of consumers say previous experience is very important or important in selecting a facility

NPS (Advocacy)

- **62%** of consumers say recommendations from family and friends are very important or important

A single metric for healthcare loyalty



SIMPLE

Use a single, trackable metric to inform marketing strategy, report on marketing ROI, and gain leadership buy-in for marketing campaigns.

HOLISTIC

Hone in on the most important aspects of consumer loyalty by assessing your strengths and weaknesses across each of the seven aspects.

COMPARABLE

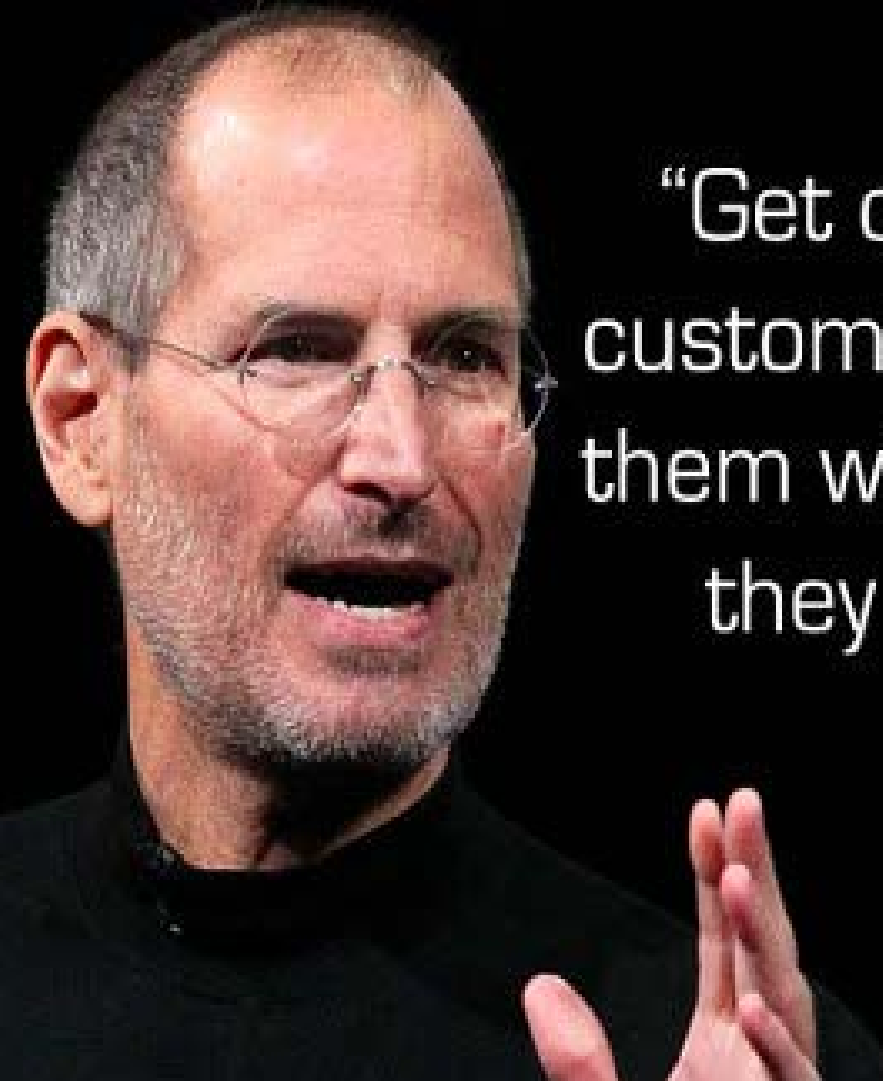
Know where you rank amongst peers in various geographic regions and understand the strengths and weaknesses of your competitors.

INSIGHTFUL

Use the correct data to design informed marketing strategies focused on driving patient acquisition, and ultimately growing consumer loyalty.

Session takeaways

1. Consumers have more choice (and power) than ever; involve them in your decision making
2. Health systems that succeed will invest in the tools that illuminate what matters most to consumers at every point in their journey
3. Loyalty can be defined and quantified with the proper insight



“Get closer than ever to your customers. So close that you tell them what they need well before they realize it themselves.”

Steve Jobs

Thank you!



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